Textbook Tracker®

CONTROLLER

User's Manual

For Macintosh and Windows

Textbook Tracker v3.3

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Textbook Tracker Controller

COMPanion offers our users the Central Union, Distributed Union, and single-site systems for school textbook management; however, there are times when even *this* variety of system models cannot conciliate specific needs. Therefore, the **Textbook Tracker Controller™**, a new model based on Multi-Data Station technology, provides yet another solution—continuing to make Textbook Tracker the *perfect* system to fit everyone's needs*!*

A Solution To A Technological Headache

Multi-Data Station technology provides an answer to the problem of growing hardware and software requirements that have faced technical staff and district administrators.

Information technicians are faced with increasing demands as more and more computers and programs are amassed. In order for districts to efficiently use their technical support staff, administrators are constantly looking for ways to cut back on activities that consume unbounded amounts of time. Some districts experiment with consolidating servers and software in attempt to reduce their technician's travel time. Many information technicians prefer Textbook Tracker's Central Union system because maintaining a program with a single database housed on a single server is preferable to having one server for every database for each school.

School administrators are also constantly faced with budgetary shortages. Therefore, they must make the best use of the funds available for staffing and resources. Increased technological demands means increased need for servers, computers, and technical staff for maintenance.

District administrators want to provide what is best for the students and staff that they serve. Within a district, the needs of elementary and secondary schools vary greatly. The needs of students in an affluent area of a district will differ from those in recognized lower-income areas. In addition, administrators feel the autonomy that they have in setting policies and purchasing materials to fit the needs of their school population is crucial in providing the best service possible. While administrators can appreciate the benefits of sharing materials and being part of one centralized school system—when all policies and resources are standardized, it may actually be a far more inferior method of servicing the needs of their schools.

Welcome to the Textbook Tracker Controller!

Now, with the Textbook Tracker Controller, the technical staff and district administrators can have a system that meets all of their collective needs.

Multi-Data Station technology saves time!

Running numerous Data Stations on a single server saves your information technicians time. Instead of having to go from school to school to maintain individual systems, all Textbook Tracker Data Stations can be housed on a single server. This server may be located in a district location rather than a school. This enables the technical staff to have easy access to the server and to save travel time as well as the maintenance time required when multiple servers are needed.

Fewer machines saves money!

Purchasing fewer servers will save the district money and provide a more cost-effective use of technical staff—circumventing the need to hire additional technical support.

Administrators retain autonomy!

Administrators will be able to customize their school systems and services to best serve the needs of their students and staff. Policies, purchases, etcetera, will be made on the local level for a better, more individualized service.

Each collection is completely autonomous and will be managed and searched separately, just as if they were separate servers running on separate machines.

Installing Textbook Tracker Controller

This section will help guide you through the Textbook Tracker Controller installation process[1]. Make sure to have the registration letter that came with your software—it contains essential product code information required during installation.

If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service at (800) 347-4942 or (801) 943-7277 or by email via: `support@companioncorp.com`

Hardware and Operating System Requirements

The Textbook Tracker Controller has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle differences between the controls at the tops of windows and minor differences in operating system functionality, the program operates identically across both platforms.

Here are the minimal hardware and operating system requirements for a Textbook Tracker Controller:

System Requirements for Textbook Tracker Controller

Minimum	Recommended
Mac OS 10.4, Windows 2000+	Mac OS 10.4 Server, Windows 20003 Server
G5 or X86, Dual Processor/Core	G5 or X86, Dual Processor/Core
2GB of RAM	4GB of RAM (or more)
20GB of free HD space per 100,000 items	20GB of free HD space per 100,000 items
TCP/IP Network	TCP/IP Network

Textbook Tracker Controller Communication Systems

The Textbook Tracker Controller requires TCP/IP to communicate between managed Data Stations and their clients.

> **¡ WARNING !**
>
> The address for each Textbook Tracker Data Station *cannot* be dynamically allocated and *must* have a fixed TCP/IP address.

1.During instruction, COMPanion assumes that you have a *basic* working knowledge of your computer's operating system.

Installation Summary *(read this first)*

Make sure that the machine on which you will be installing and running the Textbook Tracker Controller meets the minimum recommendations for both hardware and operating system software.

Step 1. Before you run the Textbook Tracker Controller, you will need to have a unique and static IP address assigned to *each* collection or Data folder that you wish to manage—including an additional IP for the Controller component itself. You can configure and add additional IP addresses to your existing (or secondary) ethernet controller using your operating system's standard network settings.

On Windows, these settings can be found under the Internet Protocol (TCP/IP) connection properties for your network connections. On Macintosh these settings can be located and configured from your Network system preferences[1].

The Textbook Tracker Controller *does not* need to be restarted in order to find IP addresses that were newly added using your operating system's network configurations.

Step 2. Download the most current version of the Textbook Tracker Controller (*www.textbook tracker.com*). COMPanion's Technical Support staff recommends that this file be saved to your operating system desktop.

Step 3. Run the Textbook Tracker Controller installer by double-clicking on the **Installer.exe** executable (Windows) or the **Installer.dmg** disk image (Macintosh)[2]. To proceed with the installation of the Controller, follow the on-screen prompts and accept the terms of the COMPanion Corporation Electronic End User License Agreement.

Step 4. After completing the installation, close the installer application (if applicable) and launch the **Textbook Tracker Controller** by double-clicking on the newly created desktop shortcut. Alternatively, you can open the Textbook Tracker Controller's program folder (i.e. installation directory) and launch it from there.

On Windows, the Textbook Tracker Controller executable will be located, by default, at:
Hard Drive *(typically C:)* > **Program Files** > **Textbook Tracker Controller**

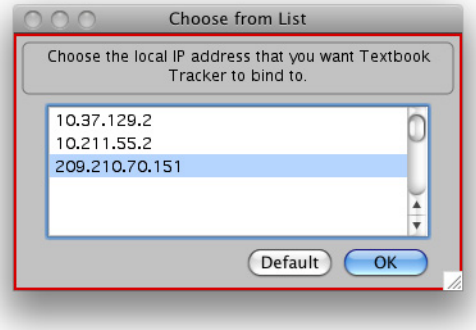
On Macintosh, the Textbook Tracker Controller application package can be found at:
Hard Drive > **Textbook Tracker Controller**

Make sure that any other COMPanion software applications that may be running on this machine (e.g. Alexandria, eLunchroom) have been shut down before attempting to run the Textbook Tracker Controller.

1.If you are inexperienced with TCP/IP protocols, please have your Information Systems Technician *(or Information Technician; IT for short)* set up multiple IP addresses—one for each data set. Otherwise, feel free to call COMPanion's Technical Support team at (800) 347-4942 or (801) 943-7277 or by email via: `support@companioncorp.com`.
2.These files will most commonly be called **Textbook Tracker Controller Installer.exe** and **Textbook Tracker Controller Installer.dmg**.

Assigning the Controller an IP Address

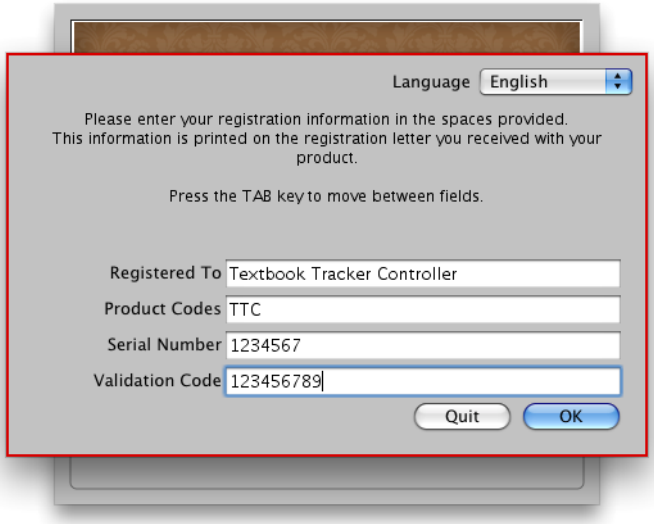
The first time you launch the Textbook Tracker Controller, you will be asked to select the IP address that you wish the Controller to permanently use.



Select the desired address from the **Choose from List** window and then click **OK**.

Registering the Controller

Proceed to register the Textbook Tracker Controller using the information provided on the product registration letter that came with your program. Enter the **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.


Language English
Please enter your registration information in the spaces provided.
This information is printed on the registration letter you received with your product.
Press the TAB key to move between fields.
Registered To Textbook Tracker Controller
Product Codes TTC
Serial Number 1234567
Validation Code 123456789
Quit
OK

After the successful entry of your registration codes, you will be presented with Textbook Tracker Controller's user interface *(documented on page 14)*.

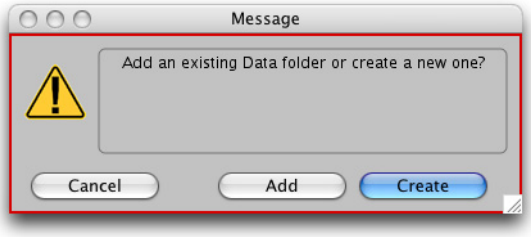
> **- NOTE -**
>
> The first time that you launch the Textbook Tracker Controller, a series of progress bars will appear at the bottom of the interface while the program rearranges some essential client resources and builds client applications. Please allow these processes to finish before proceeding. After these utilities have completed, you are ready to import existing or create brand new data collections.

Adding or Creating Textbook Tracker Data Stations

There are two methods available for importing an existing Textbook Tracker Data folder into the Controller.

TECH NOTE:
Textbook Tracker Controller creates a new "`.acf`" file in the **Client Applications** folder for each new Data Station you add.

When a Data Station's IP address is changed, it's "`.acf`" files are recreated.

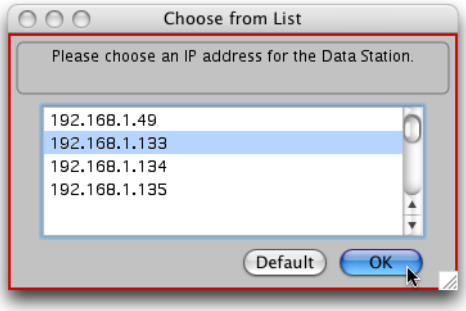


First, you may drag-and-drop an existing Data Station's **Data** folder onto the main Controller window; otherwise, you can click the **Add** button on the main Controller window. Clicking this button will give you the choice of adding an existing Data folder or creating a new one. If you choose to **Add** an existing Data folder, a standard operating system Explorer (i.e. Finder) window will appear, allowing you to guide the Controller to the directory folder containing your existing data collection[1].

If you choose to **Create** a new Data folder set from scratch, you must be prepared to complete the required registration information for the newly created Data Station. Attempting to add a Data set whose **Serial Number** already matches that of a Data Station managed by the Controller will cause a warning message to appear.

1.The Textbook Tracker Controller *will not* move an existing Data folder. Instead, a copy of the selected Data folder is made so that your original collection information is left untouched. The Textbook Tracker Controller is able to work around set file permissions; the Controller can copy *any* application bundle, even when it's set to **Read only**.

(see page 5)



NOTE:
Once registered, the Textbook Tracker Controller will omit its own IP address from the **Choose from List** window as a viable option.

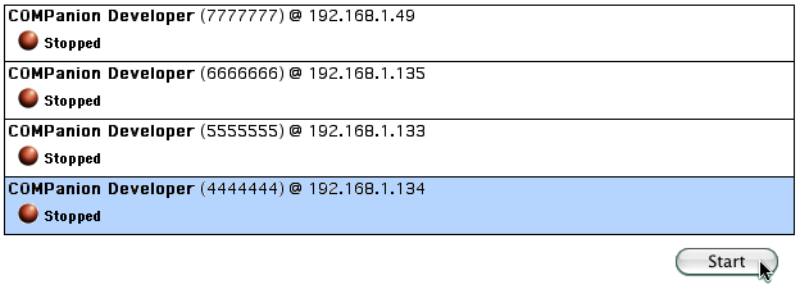
Choose from List

OK **Cancel**

first **Edit** [that] **Data Station's** **Preferences** *19)* and add your administrative-level users so that they can remotely install client workstations; also, if required, you can change your Data Station's available web ports. Please refer to the v3.3 *Textbook Tracker User's Manual* for more information on creating users and changing ports.

Activating Textbook Tracker Data Stations

The Textbook Tracker Controller has the ability to **Start** and **Stop** the individual Textbook Tracker Data Stations that it manages. When you **Add** an existing or **Create** a new Data Station, they will initially appear as **Stopped** in the main Controller interface window.

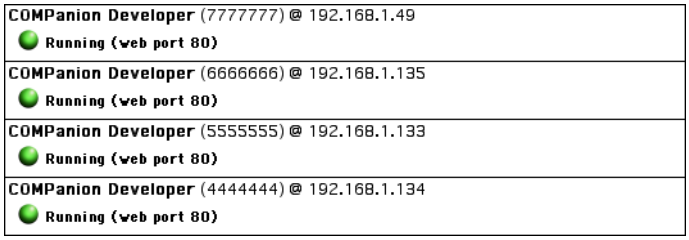


From the list, select (highlight) the Data Station you would like to activate and click the **Start** button.

You are only allowed to activate *one* Data Station at a time However, if the Textbook Tracker Controller is shut down and then restarted, all of the individual Data Stations will be automatically activated.[1] If, for some reason, one of your Data Stations fails to auto-start on launch, an "`unable to start`" error message will be recorded in the log.

1.This can be overridden if you hold down the `<shift>` key while launching the Textbook Tracker Controller.

Once a Data Station in your list has been activated, you should see a green-colored icon and the word **Running**, along with the web port that it's using, located under the name of the collection.


COMPanion Developer (7777777) @ 192.168.1.49
Running (web port 80)
COMPanion Developer (6666666) @ 192.168.1.135
Running (web port 80)
COMPanion Developer (5555555) @ 192.168.1.133
Running (web port 80)
COMPanion Developer (4444444) @ 192.168.1.134
Running (web port 80)

At this point, an activated Data Station is broadcasting—awaiting web connections on **Web Port 80** *(set as default)*, and ready to communicate with your Textbook Tracker client workstations[1].

- NOTE -

As stated on the previous page, the *very first* thing you should do after adding and activating a new Data Station is edit their essential **Preferences** *(see page 19)*. Please refer to the v3.3 *Textbook Tracker User's Manual* for detailed preference information.

1.The Textbook Tracker Controller acquires root privileges before it launches each Data Station so that it can listen on restricted ports.

Installing Client Workstations

If an individual Data Station license supports multiple users, you can install Textbook Tracker clients on remote computers over the World Wide Web.

In order to install clients over the World Wide Web, make sure that you have an **Administration User Name** and **Password** set up in the **Administration** preferences of your selected Data Station. You must also have the latest **Java** applet installed on your computer. If you don't, the following steps will instruct you on download and installation procedures.

Step 1. Make sure that the **Data Station** from which you'd like to install the client is **Running** (i.e. activated) in the Textbook Tracker Controller management list.

Step 2. Open an internet web browser (e.g. an **Internet Explorer**, **Firefox**, or **Safari** web-browsing window) on the machine where the client is to be installed.

Step 3. In the browser's **Address** field (located in the upper-left corner of the window), type the IP address of your Textbook Tracker Controlled **Data Station** followed by "`/install`".

If you are unsure which IP address your Data Station uses, it can be located to the right of the **Registered To** name and **Serial Number** in the Textbook Tracker Controller management list.

If you *still* have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact the COMPanion Technical Support team.

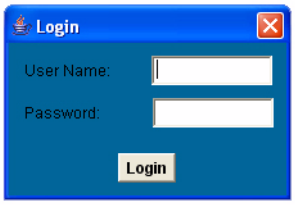
Step 4. If you performed that step correctly, the **Textbook Tracker Web Installer** page should appear.

Step 5. If you don't have the correct **Java** applet installed on your computer (in this case, **Java Plug-in 1.3** or higher), you will be required to install it before you can download clients. Your browser should automatically detect whether you have the correct Java version installed. If it does not, follow the links and install instructions that the web page provides.

Step 6. If your **Java** plug-in is up-to-date or you have just installed it, click the **Grant this session** button on the Java page to begin your **Web Install** session. You are allowed to download a Windows or Macintosh **Workstation**.

Java Plug-in Security Warning
Do you want to install and run signed applet distributed by "COMPanion Corporation"?
Publisher authenticity verified by : "COMPanion Corporation".
The security certificate was issued by a company that is not trusted.
The security certificate has not expired and is still valid.
Caution: "COMPanion Corporation" asserts that this content is safe. You should only install/view this content if you trust "COMPanion Corporation" to make that assertion.
Grant this session
Deny
Grant always
View Certificate

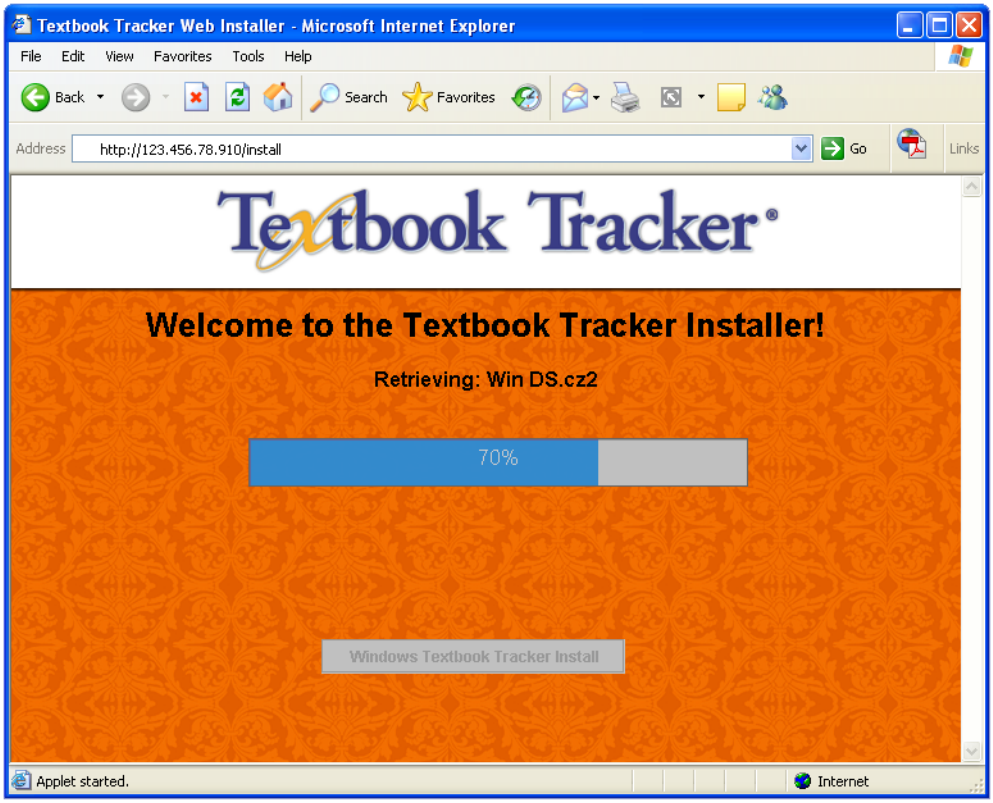
Step 7. A pop-up dialog box will require you to input your **Login User Name** and **Password**. Your user name and password are the same as those that are found on the **Administration** preferences window of your Textbook Tracker Controlled **Data Station** (see note in margin).



NOTE:
The very first thing you should have done after adding a new Data Station to the Controller is to use the **Edit Data Station's Preferences** (see page 19) menu selection to add your administrative-level users.

Please refer to the v3.3 *Textbook Tracker User's Manual* for more information on creating users.

Step 8. The client application will be downloaded to your machine. After it has finished downloading, a Textbook Tracker folder will appear on your operating system desktop with the appropriate application files inside (this folder can be moved anywhere on your machine, it's only downloaded to the desktop to make it easier to find).



Manual Installation of Client Workstations

Alternately, workstations can be installed manually by moving a copy of the client application to a permanent location on the hard disk drive of the machine where it is to be installed. These client applications can be found in the **Textbook Tracker Controller Support** folder.

On Macintosh OSX machines, this folder is located in the following directory:

Hard Drive > **Users** > **Shared** > **Library** > **Textbook Tracker Controller Support**

On a Windows machine, the shared application folder should be kept here:

Hard Drive *(typically C:)* > **Program Files** > **Textbook Tracker Controller**

Be sure to copy the *entire* folder for each client you wish to install.

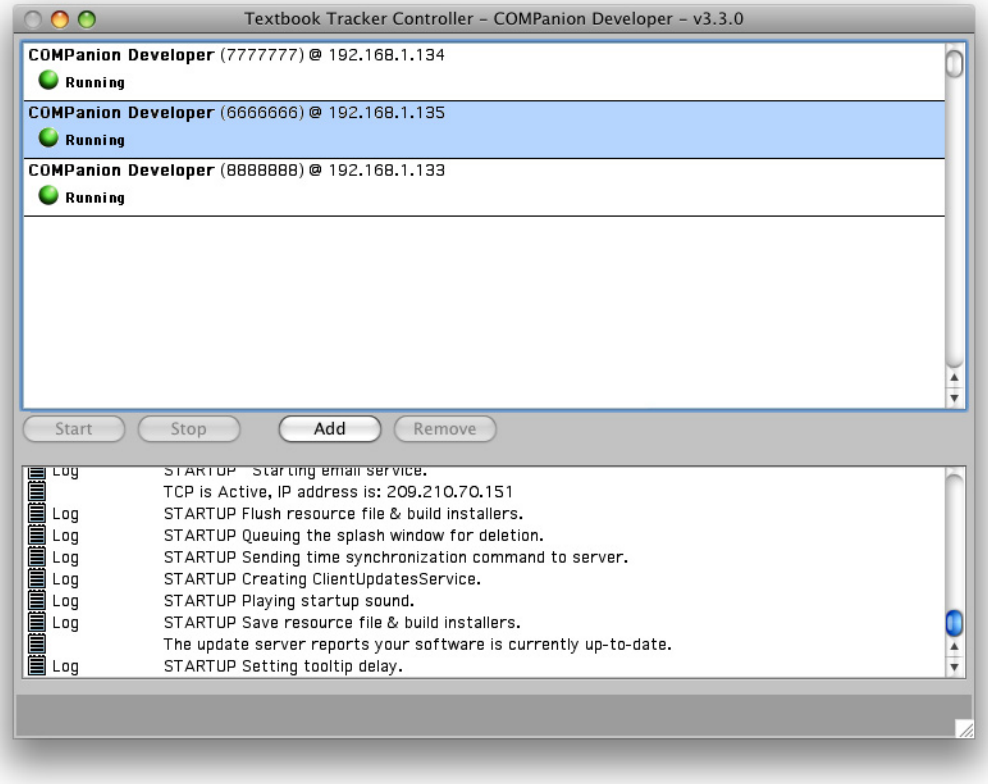
- NOTE -

When a Data Station is running under the Textbook Tracker Controller, be aware that you will need an **Administrator Username** and **Password** when installing or configuring new client workstations.

The Textbook Tracker Controller Interface

Now that you've added all of your managed Data Stations and installed all of your client workstations, the Textbook Tracker Controller is fully operational and ready to go!

Now, let's delve a little deeper into some of the more technical details of the Controller and its interface.


Textbook Tracker Controller – COMPanion Developer – v3.3.0
COMPanion Developer (7777777) @ 192.168.1.134
Running
COMPanion Developer (6666666) @ 192.168.1.135
Running
COMPanion Developer (8888888) @ 192.168.1.133
Running
Start
Stop
Add
Remove
Log STARTUP Starting email service.
TCP is Active, IP address is: 209.210.70.151
Log STARTUP Flush resource file & build installers.
Log STARTUP Queuing the splash window for deletion.
Log STARTUP Sending time synchronization command to server.
Log STARTUP Creating ClientUpdatesService.
Log STARTUP Playing startup sound.
Log STARTUP Save resource file & build installers.
The update server reports your software is currently up-to-date.
Log STARTUP Setting tooltip delay.

The main Controller interface window is easily broken down into two distinct sections.

The top half of the main Controller window contains your list of managed Data Stations. This list contains information about which Data Stations are active or stopped, their names, serial numbers, IP address, and port numbers.

The list of managed Data Stations can be rearranged and reordered by selecting (highlighting) the desired Data Station and dragging it above or below other existing Data Stations.

You may right-click (Windows) or `<ctrl>`-click (Macintosh) on any Data Station in this list to open the **Controller** menu *(see "Controller Menu" on page 19 for more information)*. The **Controller** menu allows you to **Add** or **Remove** a Data Station, assign an IP address, or edit the Data Station's preferences.

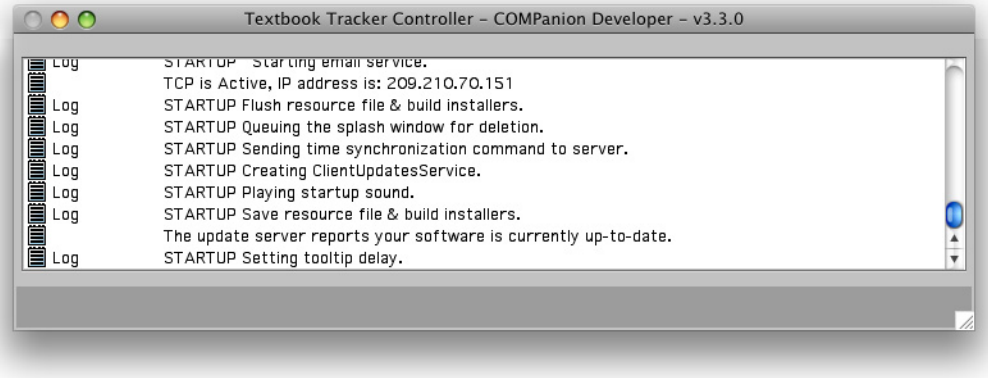
If you select (highlight) a specific Data Station from the list, it will turn blue—allowing you to use the **Start** button to activate the Data Station (if it is stopped) or use the **Stop** button to deactivate a Data Station (if it is running).

You may also click on the **Add** button, causing a message window to appear. You will be given a choice to **Add** a new Data folder or **Create** a new one. If you wish to do neither, click **Cancel**.

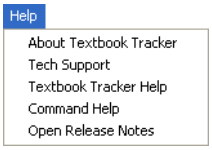
For more information on importing or creating new Data Stations, please review "Adding or Creating Textbook Tracker Data Stations" on page 6.

The Controller Log

The bottom half of the main interface window contains the controller log. The controller log captures and stores all pertinent Controller information, including when each Data Station is stopped or started, and any special operations (e.g. archive or rebuild) that have been performed.


Textbook Tracker Controller – COMPanion Developer – v3.3.0
Log STARTUP Starting email service.
TCP is Active, IP address is: 209.210.70.151
Log STARTUP Flush resource file & build installers.
Log STARTUP Queuing the splash window for deletion.
Log STARTUP Sending time synchronization command to server.
Log STARTUP Creating ClientUpdatesService.
Log STARTUP Playing startup sound.
Log STARTUP Save resource file & build installers.
The update server reports your software is currently up-to-date.
Log STARTUP Setting tooltip delay.

While in this section, you may select **Print** from the **File** menu to print the log. The controller log is automatically saved by the Controller. Logs are saved inside the **Log** folder, located in the **Textbook Tracker Controller Support** program directory.



Textbook Tracker Controller Menus

The Textbook Tracker Controller menus follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Textbook Tracker Controller are very similar to the **File** and **Edit** menus in other applications. Additional menus have purposes specifically related to Data Station management.

Controller/Help Menu

If you are using Macintosh, there is a Textbook Tracker **Controller** drop-down menu that contains the **About Textbook Tracker Controller** and **Quit Textbook Tracker Controller** selections. There is also a **Help** menu that contains **Textbook Tracker Help** and **Open Release Notes** selections.

On Windows, all these selections are located under the **Help** menu.

About Controller

Shows copyright and version information.

Tech Support

This opens the **Technical Support** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don't have your own SMTP (simple main transfer protocol) address configured.

Controller Help

If the **Controller Help** documents are installed on your system, this menu selection opens them.

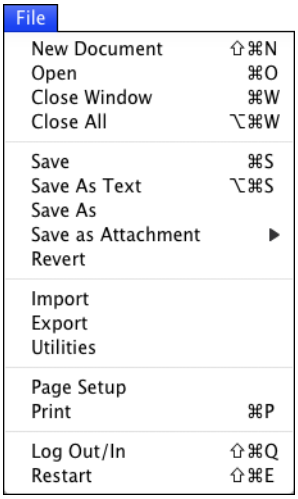
Open Release Notes

If the Textbook Tracker Controller release notes are available, this menu selection will display them.

Quit/Exit Controller

Quits the Textbook Tracker Controller program.

File Menu



The Textbook Tracker Controller **File** menu provides the following selections.

New Document—Opens a new COMPedit document. COMPedit is the Textbook Tracker Controller's integrated word processor.

Open—Opens the standard operating system explorer window used to locate files. When you select a document from this window, the Controller will open it (if it is able). Use this command to open COMPedit documents, TEXT documents, and other files for viewing.

Close Window—Closes the top window.

Close All—Closes all windows except for the main Controller interface window.

Save—When enabled, saves the contents of the top window.

Save As Text—Saves a copy of the currently visible COMPedit document as a TEXT file.

Save As—Allows you to save "`.vwp`" documents to specific locations on your hard drive.

Revert—Changes made to the current document are discarded and the original document is displayed in the COMPedit word processor.

Utilities—Utilities are used to check for updates and download the newest resources for your Textbook Tracker Controller *(see "Textbook Tracker Controller Utilities" on page 37)*.

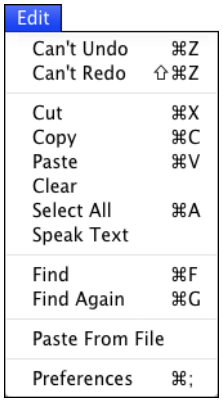
Page Setup—Operating system standard function that sets the page up for printing.

Print—Prints the contents of the COMPedit window or any other window that has focus.

Print to PDF—This allows you to save any finished reports or COMPedit documents as Adobe PDF files (Macintosh only).

Log Out—This command closes the main Controller window and disallows anyone without proper authorization to access the Controller. Instead, an Textbook Tracker Controller **Login** window appears, awaiting a correct **User Name** and **Password**. If a high-level user steps away from the Controller and doesn't want to quit or restart, the **Log Out** function provides this security. The **Require User Login** box in **Administration Preferences** must be checked for this option to work.

Restart—Logs out the current users, closes all windows, restarts the Controller program, and if **Passwords/Security** is turned on, brings up the **Login** window. If no security has been activated, the Controller just restarts to the main window.



Edit Menu

This menu includes standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to the Textbook Tracker Controller are included below.

Undo Typing—This command only undoes typing or cut-and-paste operations in individual fields or in the word processor. It does *not* undo operations from other menus, commands and controls.

Redo/Can't Redo—An undo for the undo.

Cut, Copy and Paste—You can cut, copy, and paste text from certain fields to others within the Textbook Tracker Controller.

Clear—Clears the selected text or selected list elements.

Select All—Selects all the text in the current edit field, current word processor document, or list.

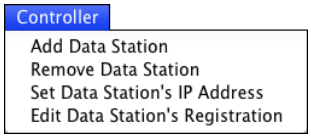
Find—This selection opens the **Find** window. Dependant upon which window is open, **Find** can be used to locate specific information or text in a word processing file.

Find Again—Finds the next piece of matching information in a COMPedit document.

Paste From File—Allows the user to paste information from a file.

Preferences—This selection opens the **Preferences** window. Preferences are used to customize the Textbook Tracker Controller to suit your needs *(see "Textbook Tracker Controller Preferences" on page 21)*.

Controller Menu



This menu only appears when the main Textbook Tracker Controller interface window has focus. You can also right-click (Windows) or <ctrl>-click (Macintosh) anywhere on the Controller interface window to force this menu to appear.

Add Data Station—This selection does the same thing as clicking the **Add** button on the Controller's main interface window *(see "Adding or Creating Textbook Tracker Data Stations" on page 6)*.

Remove Data Station—This selection does the same thing as clicking the **Remove** button on the Controller's main interface window. If you have a Data Station selected (highlighted) in the management list, this selection will become available[1]. Use caution; once you've removed a Data Station from the Textbook Tracker Controller, it *can not* be restored.

Set Data Station's IP Address—If you created a new Data Station but had no IP addresses available during its inception, the Data Station will still be added to the Controller list. However, it will appear as **Stopped** until you've supplied it with a working IP address.

Once you've set up additional IP addresses using your operating system's network configuration tools, you can use this selection to assign the highlighted (selected) Data Station one of the newly created IP address *(see "Adding or Creating Textbook Tracker Data Stations" on page 6)*.

If only one IP address is available, the Controller will automatically skip the **Choose from List** window and assign the last remaining IP to an addressless Data Station.

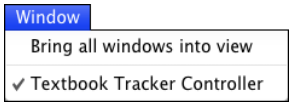
After the Data Station has been assigned an IP address, it is immediately activated.

Edit Data Station's Registration—This will open the Data Station's **Registration** window, allowing you to update your registration information. The Textbook Tracker Controller will require a restart once your registration information has been updated[2].

- NOTE -

Some of the selections in the **Controller** menu (e.g. **Remove Data Station** or **Edit Data Station's Preferences**) will appear grayed-out and disabled until you have **Stopped** the selected Data Station from running.

1.The **Remove Data Station** selection is disabled until the selected Data Station you wish to remove has been **Stopped**.
2.This menu selection will only become available after you've **Stopped** the selected Data Station from running.



Show Menu

Use this menu to move between various Controller modules (if available).

Window Menu

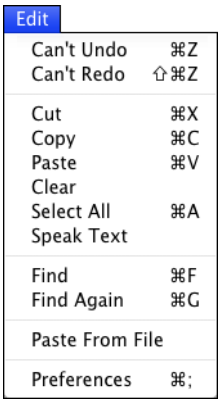
As you open new windows in the Textbook Tracker Controller, the **Window** menu will display a list of all currently active windows. The example **Window** menu in the margin shows that the **Textbook Tracker Controller** window is open and active and the **Preferences** and **Utilities** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the Controller's main interface window.

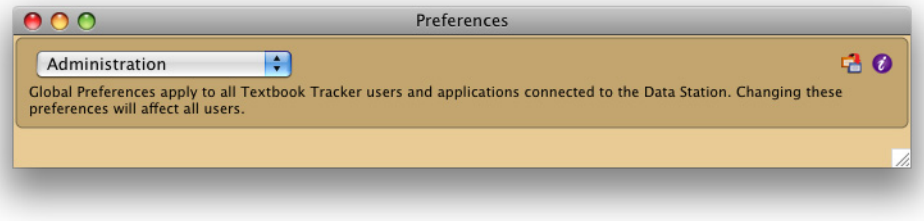
When you close a window, it is removed from this menu.

Textbook Tracker Controller Preferences



Although you're required to make changes to the individual Data Station preferences that your Textbook Tracker Controller manages—the actual Controller *also* contains some preferences of its own. However, these preferences are limited to just a few panes containing globally-based settings.

The Textbook Tracker Controller's **Preferences** are used to customize security settings, email information, and scheduled events for all managed Data Stations.


Preferences
Administration
Global Preferences apply to all Textbook Tracker users and applications connected to the Data Station. Changing these preferences will affect all users.

The top portion of every preference window consists of a drop-down menu and two standard Textbook Tracker Controller buttons. The drop-down menu on the left is the **Preference** selection menu. Use this menu to shuffle through Textbook Tracker Controller's various preference windows. For more information on an individual Controller preference window, please review its corresponding section in this document.

On the far top-right of every preference window are two Textbook Tracker Controller standard buttons. The first button is a preference specific **Restore**/**Revert** button. This button will restore the Textbook Tracker Controller preference windows to its original settings; reinstating any information or fields that were supplied via registration codes.

The second button is the Textbook Tracker Controller standard **Help** button.

The sections that follow will describe, in detail, each preference window and then demonstrate how to use them.

To set up or change Textbook Tracker Controller preferences, you must first activate the **Preferences** window from the **Edit** menu. You may also use the "`Ctrl+;`" (Windows) or "`Cmnd+;`" (Macintosh) shortcut command. Once the **Preferences** window appears, click on the drop-down menu in the upper-left corner of the window to view your available preferences.

- NOTE -

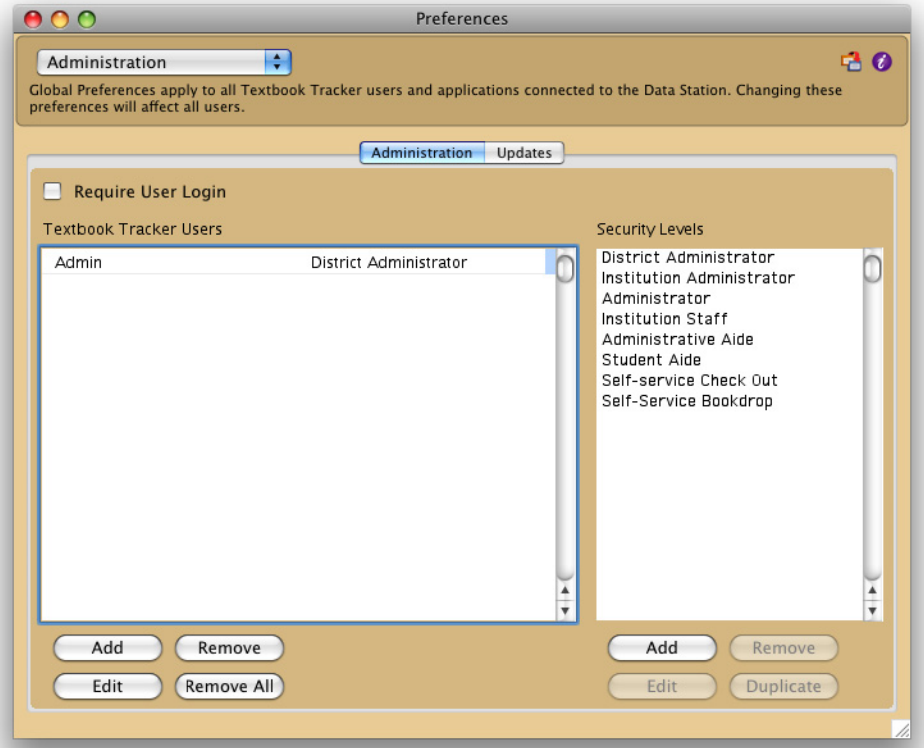
Since the Textbook Tracker Controller and Web Router only contain global-based preferences, they will not show **Local**/**Default Local** drop-down menus.

Administration Preferences

Set up Textbook Tracker Controller users and access levels; activate passwords.

Administration Tab

The **Administration** tab of the **Administration** preference window allows you to setup and create any number of Textbook Tracker Controller users, each with their own unique (or identical) security level. Although you may have users with duplicate security levels, you can not have duplicate user names.



This window contains a large **Textbook Tracker Users** field, which is basically a list that contains the **Name** and **Security Level**(s) of your existing Textbook Tracker Controller users; you may select (highlight) any of the users contained within this field in order to edit their information or remove them completely.

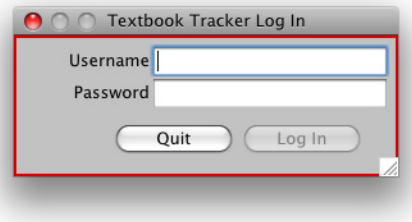
This preference tab also contains the **Add User**, **Remove User**, **Edit User**, and **Remove All** buttons (located at the bottom-left corner of the window); these buttons allow you to create, remove, and edit Textbook Tracker Controller users. The subsequent pages will further detail the usage of these buttons[1].

1.For more information on **Security**, please see "Activating Security" on page 23.

Activating Security

Check the **Require User Login** box on the **Administration Users** preference window to activate the Controller's **Log In** security. When this box is checked, the Textbook Tracker Controller will require a username and optional password[1] every time that the program is launched.

Even if you haven't yet logged in, the Textbook Tracker Controller will be running from the moment you see the **Textbook Tracker Log In** window—all Data Stations will have already been activated.



When the **Textbook Tracker Controller Log In** window appears, enter the appropriate **Username** and optional **Password** and click **Log In** to access the Textbook Tracker Controller.

The username that you enter during log in will be recorded to the **Controller log** as well as any failed login attempts.

1.If a password was not supplied when creating a new user in the **Add User** window *(page 24)*, then this field will not be required.

Adding Users

Click the **Add User** button (the red "+" icon), or use <cmnd+N> (Macintosh) or <ctrl+N> (Windows), to add a new user to the Controller. The **Add User** window will appear, requesting that you provide specific new user information.

Enter the username[1], a password[2], confirmation password, email address, and security **Level** for the new user. If you have not previously created any users, the **Level** drop-down menu will be set to **District Administrator** and you will be unable to change it. Once you have created a **District Administrator**, you can add other new users with access levels other than **Administrator**.

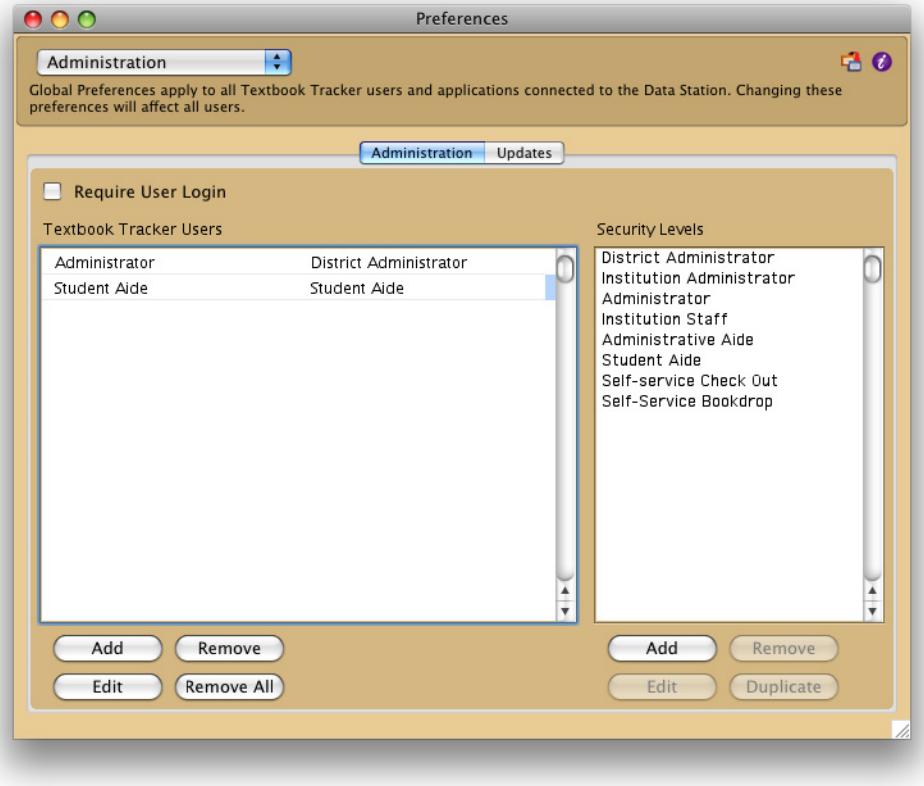
If you would like to add an user's picture at this time, you can import a GIF, BMP, PIC, JPG (or any other standard image file); here are some ways that you can do this:

Drag and drop—Open the picture with your system's default picture viewer. Drag the graphic from the desktop or program onto the Controller's **Add User** window. As you drag the picture, a box outline shows where the picture is to be placed to help you align it properly.

Paste and Copy User Picture[3]**—**Open the picture with your system's default picture viewer. Select the graphic and copy it to your operating system clipboard (this is usually done with commands such as **Select All**, **Copy**, and **Cut** under the **Edit** menu in the program). Go back to the Controller's **Add User** window and choose **Paste Patron Picture** by right-clicking (or ctrl-clicking using a one-button mouse) in the patron picture field. The picture should now appear in the area located to the right of information fields.

1.If you choose a username that is already in use, the Controller will ask you to choose another.
2.Passwords are *not* case sensitive. Upper and lowercase characters match. Although you may leave the Password field blank (meaning that a user requires no password upon Log In), it is *strongly* recommended that this is *not* done.
3.Windows users are required to have Apple's QuickTime installed to view some picture formats.

When you click the **OK** button, the new user **Name** and **Security Level** will appear in the **Textbook Tracker Users** field.



Removing Users

To remove a Textbook Tracker Controller operator, select (highlight) the user **Name** from the **Textbook Tracker Users** field and click the **Remove** button. If you have **Textbook Tracker Users** with security levels other than **Administrator** you will be unable to remove the **District Administrator** unless you have another existing **District Administrator**.

Edit Users

You may edit the username, password, email address, and security level of any existing Textbook Tracker Controller user. To edit an existing user's information, double-click on a user's name in the **Textbook Tracker Users** field. Alternately, you may select (highlight) the user's name from the **Textbook Tracker Users** field and click the **Edit** button (located at the bottom left-hand side of the window). Doing this opens the **Edit User** window (similar to the **Add User** window described on page 24); using this window, you may change any of the user information fields.

NOTE:
Usernames and passwords are not case sensitive.

Security Levels

Below are the default security levels available within Textbook Tracker Controller. Each of these default security levels can be edited; however, they can *not* be deleted or renamed.

District Administrator—Full access to every control and setting within Textbook Tracker Controller, including the ability to examine and change registered users. Users at this level can edit district level preferences and have access to all (global) school/institution preferences. All other access levels can only modify records from their assigned school or institution. The **Glvwulf w Dgp lqlvwudwru** security level *can not* be modified.

Institution Administrator—Full access to every control and setting within Textbook Tracker Controller, including the ability to examine and change registered users. For multi-institution licenses, users at this level can only edit (local) preferences for their assigned client workstation.

Administrator—Full access to every control and setting within Textbook Tracker Controller except the ability to examine registered users.

Institution Staff—Access to all system functions and reports except **Preferences**, **Import** and **Utilities**.

Administrative Aide—Access to standard circulation commands and the authority to allow restricted actions. For example, if a patron has been issued too many textbooks, a warning message will appear during the next attempt to loan an item to the patron. With this security level, the administrative aide can override the message and allow the patron to be issued another textbook.

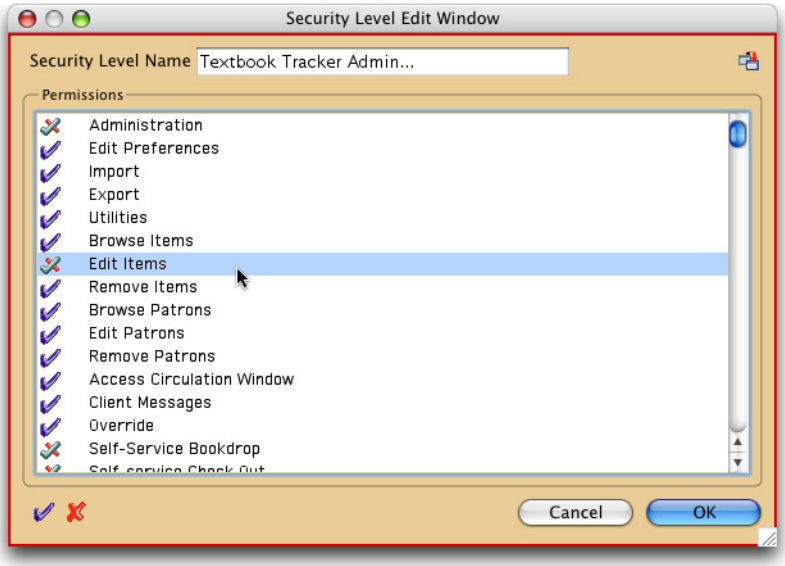
Student Aide—Access to standard circulation commands, but no authority to allow restricted actions. See the description of **Administrative Aide** (listed above) for an example of a restricted action.

Self-Service Check Out—This access level will only allow users to check in or bookdrop items using the **Data Station** or **Client Workstations**.

Self-Service Bookdrop—This access level will only allow users to check in items using the **Data Station** or **Client Workstations**. At this security level, overdue fines are automatically recorded with no opportunity to accept payment, or forgive/adjust fines. Fines are still displayed in the transaction log.

Adding, Editing, and Removing Custom Security Levels

Users with the appropriate authority can add, edit, or remove any of Textbook Tracker Controller's security levels with the exception of the default security levels, which *can* be edited, but *not* removed or renamed.



Add—This button, located on the **Security Levels** section of the **Administration** tab on the **Administration Preference** window, opens the **Security Level Edit Window**. This window allows users to create their own custom security levels. Enter the name for the new security level in the **Security Level Name** field.

Clicking on any permission in the **Permissions** section of the **Security Level Edit Window** will enable or disable that security option for the newly created security level. The **Enable All** (blue checkmark) icon located on the bottom left of the window will activate all permissions while the **Disable All** (red X) icon will disable all permissions.

When you have finished creating your own custom security level, click **OK** to save the new security level or **Cancel** to discard it.

Remove—Users with the appropriate authority can remove a custom created security level by highlighting (selecting) the level from the **Security Level** portion of the **Administration** preference window's **Administration** tab and clicking the **Remove** button. Users will not be able to remove any of Textbook Tracker Controller's eight default security levels.

Edit—This button opens the **Security Level Edit Window**. This window allows users to edit any of Textbook Tracker Controller's existing security levels. Although you can edit the name of most security levels, you will be unable to change the names of Textbook Tracker's default starting security levels. Furthermore, each security level name *must* be unique.

Clicking on a permission in the **Permissions** section of the **Security Level Edit Window** will enable or disable that security option for the existing security level. The **Enable All** (blue checkmark) icon located on the bottom left of the window will activate all permissions while the **Disable All** (red "X") icon will disable all permissions.

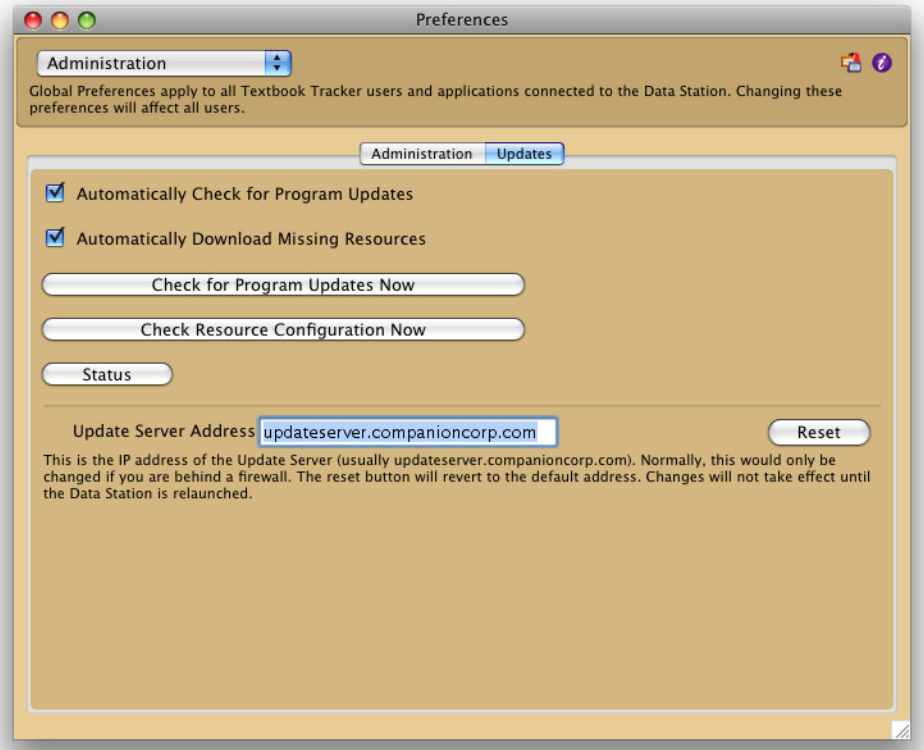
When you have finished editing the current security level, click **OK** to save your changes or **Cancel** to discard them.

Duplicate—If you would like to copy an existing security level and it's list of enabled and disabled security options, select (highlight) the **Security Level** to be duplicated from the **Administration** preference window's **Administration** tab and click the **Duplicate** button. A **Security Level Name** window (like the one shown below) will appear asking what to name your newly duplicated security level. Be aware that you must enter a new, original name for your duplicate security level; they can't be duplicated without a name and they can't use an existing security level name.

From this point on, you may treat the newly duplicated security level as you would any existing security level; it may be edited, it's name changed, or it may be completely removed from the system.

Updates Tab

The Textbook Tracker Controller can be updated automatically over the World Wide Web.


Preferences
Administration
Global Preferences apply to all Textbook Tracker users and applications connected to the Data Station. Changing these preferences will affect all users.
Administration
Updates
Automatically Check for Program Updates
Automatically Download Missing Resources
Check for Program Updates Now
Check Resource Configuration Now
Status
Update Server Address
updateserver.companioncorp.com
Reset
This is the IP address of the Update Server (usually updateserver.companioncorp.com). Normally, this would only be changed if you are behind a firewall. The reset button will revert to the default address. Changes will not take effect until the Data Station is relaunched.

Automatically Check for Program Updates—If this box is checked, the Controller will automatically check for product updates on start-up. If newer versions of the program are available, an entry will be placed in the log. You can also download updates via the **Check for Updates** utility.

Automatically Download Missing Resources—If this box is checked, the Controller will automatically verify on start-up that you have the latest versions of the client resources. Status entries will be placed in the log, and if any resources are missing, they will be automatically downloaded.

Check for Program Updates Now—Clicking this button will immediately check for available Textbook Tracker Controller updates from the update server. If they are available, you can download them.

Check Resource Configuration Now—Clicking this button will immediately check your Textbook Tracker Controller installation for any missing resources. If you are missing resources, you can download them.

Status—This will display a status report of update and resource information. It will not download any resources or updates, or modify your configuration in any way.

Update Server Address—This is the IP address of the COMPanion Update Server (usually `updateserver.companioncorp.com`). Normally, this will only be changed if you are behind a firewall. The **Reset** button will revert to the default update server address. Changes will not take effect until the next time that the Controller is restarted.

Performing Software Updates

NOTE:
Make sure to read the Read-Me file thoroughly for important information regarding the update.

There are two ways you can perform software updates from within the Textbook Tracker Controller. If you have an internet connection, you can check for Textbook Tracker Controller updates using COMPanion's Update Server. If you select **File**, **Utilities**, **Check For Updates**, and an update is available, a description of the update is shown under the **Get Read-Me** selection. From there, you can choose to update the Textbook Tracker Controller or wait for a future date. If you are sure you want to update to the newest version of the Controller, an easier method is to use the **Updates** tab in the **Dgp lqlvwdwlr q** preference window under **Edit**, **Preferences**.

You can also download the newest COMPanion and Textbook Tracker Controller software updates from the official website (`www.companioncorp.com`). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Textbook Tracker Controller registration name, email address, school/company and serial code in order to proceed with the download; these can be found on the registration letter you received when you purchased the Controller or when you renewed your support contract.

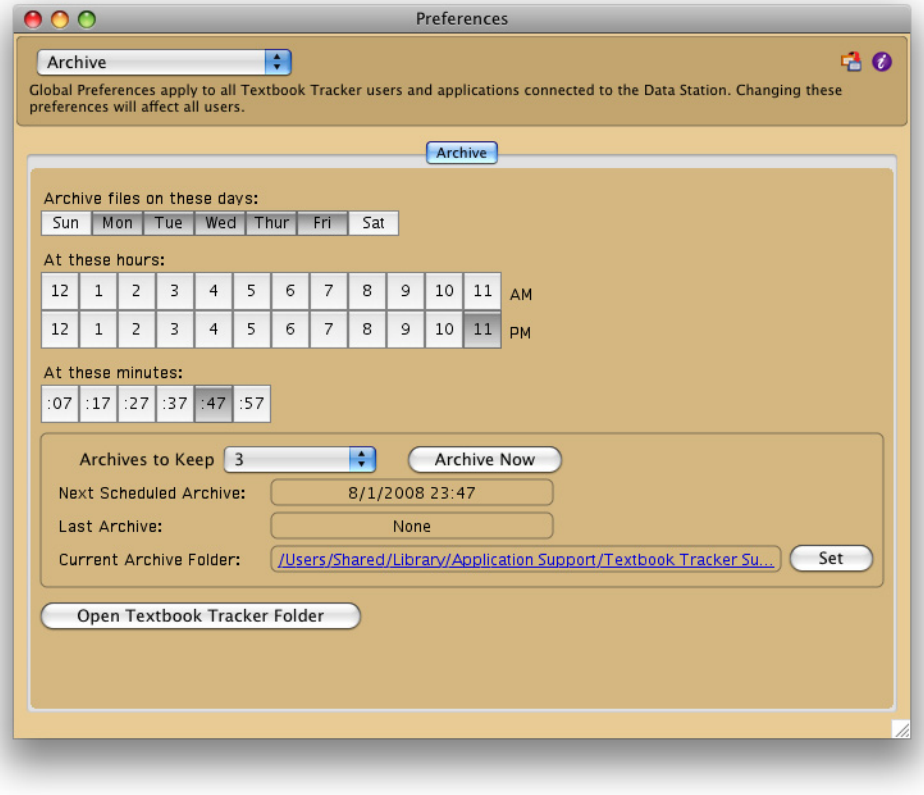
If you have accidentally misplaced your registration letter, COMPanion's 24 hour Technical Support team will be able to assist you.

If you don't have a reliable internet connection (or are unable to download the newest updates), you can contact COMPanion (via email or Tech Support at 800-347-4942) and request that a Textbook Tracker Controller Update CD-ROM be sent to your location.

Archive Preferences

Archive Tab

The **Archive** window allows you to schedule automatic backups of all your valuable Textbook Tracker Data Station information. This preference keeps three backups inside the **Archive** folder, which is located in your **Textbook Tracker Controller Support** system folder. Clicking on the **Open Archive Folder** button will open the application support directory where all your archived data is stored.


Preferences
Archive
Global Preferences apply to all Textbook Tracker users and applications connected to the Data Station. Changing these preferences will affect all users.
Archive
Archive files on these days:
Sun Mon Tue Wed Thur Fri Sat
At these hours:
12 1 2 3 4 5 6 7 8 9 10 11 AM
12 1 2 3 4 5 6 7 8 9 10 11 PM
At these minutes:
:07 :17 :27 :37 :47 :57
Archives to Keep 3
Archive Now
Next Scheduled Archive: 8/1/2008 23:47
Last Archive: None
Current Archive Folder: /Users/Shared/Library/Application Support/Textbook Tracker Su...
Set
Open Textbook Tracker Folder

When it's time for an archive, all information in your Data Station's **Data** folder is copied to a subdirectory in the **Archive** folder. All services on the Data Station being archived are disabled[1].

Although you can disable the automatic archiving function, this is *not* recommended. Your most recent archives (combined with your off-site backup) are invaluable in securing the safety of your school data.

- NOTE -

1. This feature will archive *all* of your managed and active Data Stations.

The Data Station must be **Running** when you have the archive scheduled to take place. Thus, if the administrator doesn't want to leave their computers running overnight, they should change the default time(s) that the program is set to archive.

How Archiving Works

NOTE:

Archives are not a backup! Keeping an offsite backup is highly recommended.

Archives come in handy when trying to fix a bad import, but are entirely useless in the event of a system crash.

If the **Archives To Keep** drop-down menu is set to anything below four (including zero), the **Archive Now** button will keep five *manual* archives (as though the **Archive To Keep** preference was set to 5) and when a sixth *manual* archive is requested, the Controller will first create a new data archive before removing the oldest archive in the **Textbook Tracker Controller Support** > **Archive** folder.

In other words, every time you click the **Archive Now** button, the Controller will perform a *manual* archive (even if your **Archives To Keep** is set to zero). However, if your **Archives To Keep** preference is set higher than 5, then the **Archive Now** selection will no longer ignore the **Archives To Keep** preference; in other words, *manual* archives will now be restricted to the specified **Archives To Keep** value.

The Textbook Tracker Controller will perform an automatic archive based on the value specified in the **Archives To Keep** drop-down menu. Therefore, if your **Textbook Tracker Controller Support** > **Archive** folder contains more archives than the **Archives To Keep** preference states, the Controller will remove all of the surplus archives (oldest archives first) after it creates a new *automatic* archive.

For example, if you have the **Archives to Keep** preference set to `2` and the Controller has already created two *automatic* archives in the **Textbook Tracker Controller Support** > **Archive** folder, you will be able to add three additional *manual* archives to the folder, equalling five total archives.

If the **Archives to Keep** preference is set to `10` and the Controller has already created four *automatic* archives in the **Textbook Tracker Controller Support** > **Archive** folder, you will be able to add six additional *manual* archives to the folder.

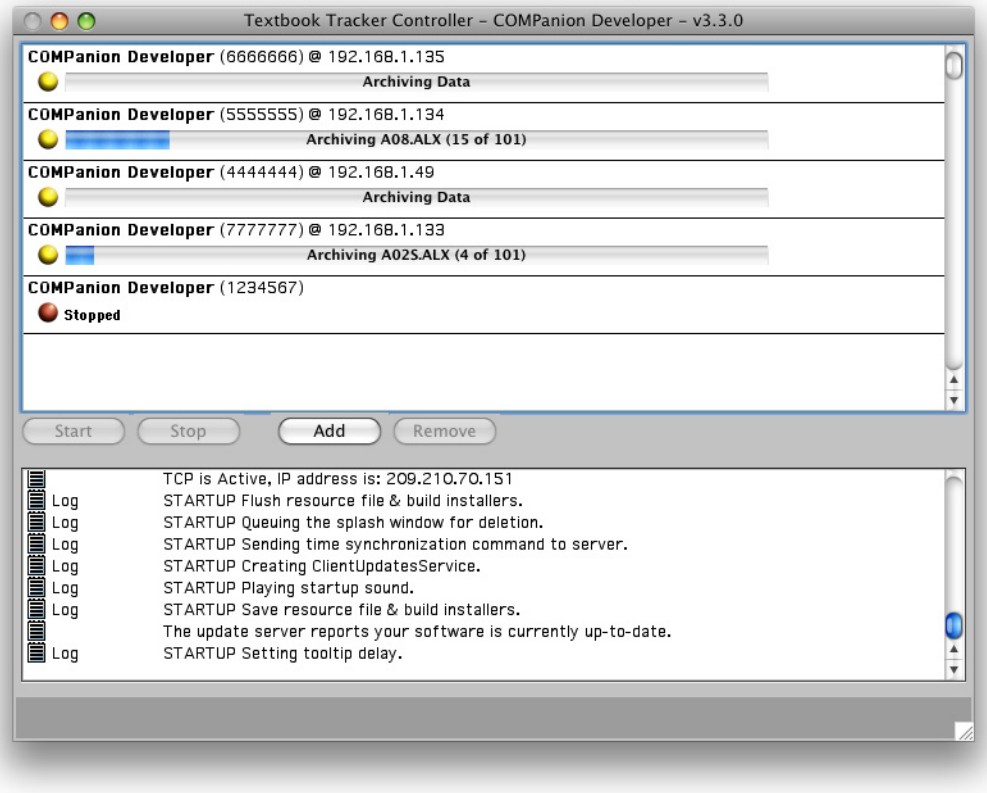
During an *automatic* archive, if the **Archives to Keep** preference is set to `2` but you have *manually* created three additional archives, the Controller will create a new automatic archive before deleting the three oldest archives in the **Textbook Tracker Controller Support** > **Archive** folder. This way, the number of remaining archives will match the value specified in the **Archives to Keep** preference (in this instance, two).

Use the **Refresh** button to update the dates and times for the **Next Scheduled Archive**, and **Last Archive**.

Archiving with Textbook Tracker Controller

Using the Textbook Tracker Controller, you can schedule archives for all your managed Data Stations. The *actual* archives, however, are performed individually by each Data Station.

While an archive is taking place on a controlled Data Station, it's progress is shown on the Controller's interface window.


Textbook Tracker Controller – COMPanion Developer – v3.3.0
COMPanion Developer (6666666) @ 192.168.1.135
Archiving Data
COMPanion Developer (5555555) @ 192.168.1.134
Archiving A08.ALX (15 of 101)
COMPanion Developer (4444444) @ 192.168.1.49
Archiving Data
COMPanion Developer (7777777) @ 192.168.1.133
Archiving A02S.ALX (4 of 101)
COMPanion Developer (1234567)
Stopped
Start
Stop
Add
Remove
TCP is Active, IP address is: 209.210.70.151
Log STARTUP Flush resource file & build installers.
Log STARTUP Queuing the splash window for deletion.
Log STARTUP Sending time synchronization command to server.
Log STARTUP Creating ClientUpdatesService.
Log STARTUP Playing startup sound.
Log STARTUP Save resource file & build installers.
The update server reports your software is currently up-to-date.
Log STARTUP Setting tooltip delay.

When your Data Station is managed by the Textbook Tracker Controller, client workstations will no longer have the ability to directly edit their Data Station's **Archive** location. Instead, this location is **Set** for all your managed Data Stations in the **Archive** preferences of the Controller itself.

Furthermore, when a Textbook Tracker Controlled Data Station is forced to rebuild on startup, it's **Data** folder is also archived to the location **Set** in the Controller's **Archive** preferences.

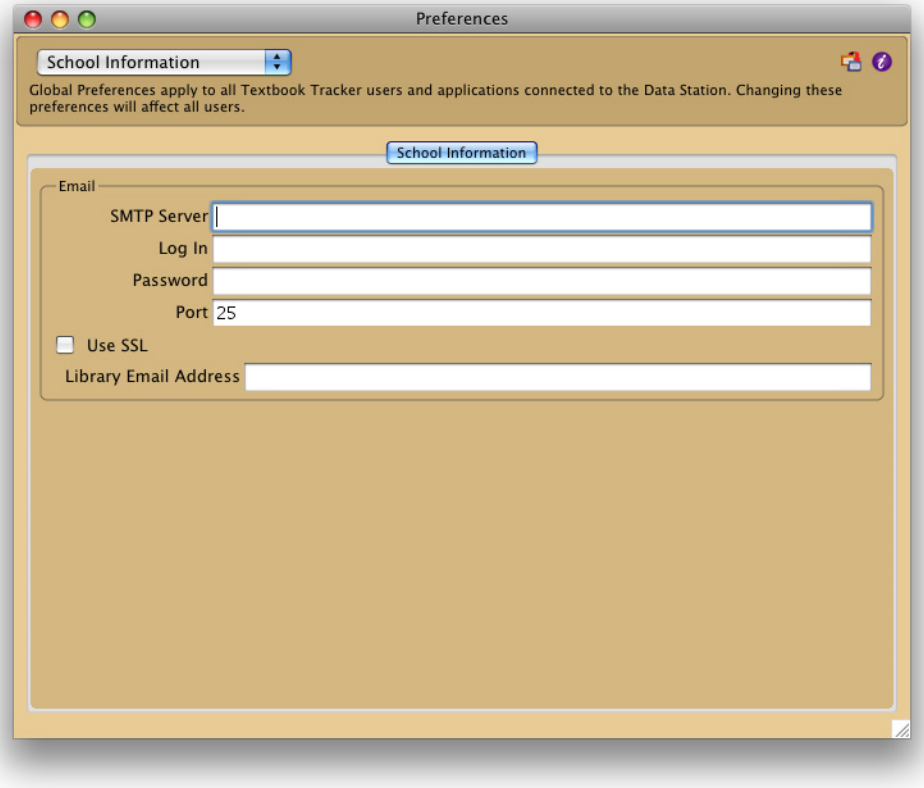
If the **Archive** folder is removed, the Controller will recreate the folder. If it can't recreate the folder, it will revert back to the standard, default location. This way, your Data Station will always have its archives saved in the correct location.

School Information Preferences

Use these preferences to configure technical district email information.

School Information Tab

Email notifications are sent to all District Administrators who have supplied email addresses. If, for some reason, a Data Station unexpectedly stops running, the Textbook Tracker Controller will send an email notice to all of the District Administrators.



SMTP Server—This is the TCP/IP or DNS address of your school's mail server. Typically, this will be "`mail.`" followed by your domain name. You must enter a valid SMTP Server address to use email services. Default is blank.

Log In—Enter the log in or user identification for the email sever.

Password—Enter the password for the email server.

Port—Supply the port number that your email server uses.

Use SSL—Short for **S**ecure **S**ockets **L**ayer; check this box if you would like to apply another protocol for transmitting data securely over the World Wide Web. While SSL provides for higher security email transfers, it is not compatible with all email servers.

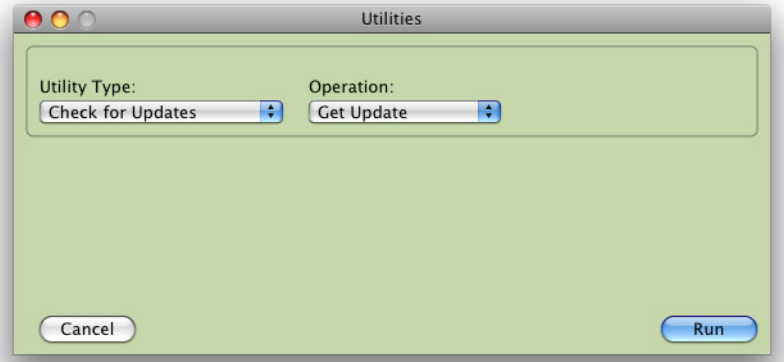
Library Email Address—This is the school's email address, which is used as the main address for email messages sent by the Controller. You must enter a valid email address to use most email services, including COMPanion's Technical Support services. Default is blank.

Textbook Tracker Controller Utilities

The Controller's **Check for Updates** utility downloads important updates to your software.

Check for Updates

This utility will check for any available Textbook Tracker Controller or Data Station updates. If there are any available, they will be presented and you will have the option of choosing which you would like installed. You should **Archive** your Data Stations before performing an update; we recommend that you read the release notes thoroughly beforehand to ensure that your hardware meets the minimum system requirements and so that you are aware of any major software changes that were made.



Get Update

This utility will verify that you have the latest versions of the client resources. If any resources are missing or there are new resources available, they will be downloaded.

What Happens When the Textbook Tracker Controller Timeouts?

The Textbook Tracker Controller contains advanced Multi-Data Station technologies. Although it's not necessary to understand how the Controller does what it does, this section is for the technical person who wants to know a little more about what happens when the Textbook Tracker Controller quits or times out.

- Quitting the Textbook Tracker Controller causes all of the Data Stations to quit. Non-responsive Data Stations are *forcibly* terminated after five seconds with an additional five seconds for each active Data Station.
- Before the Textbook Tracker Controller quits after downloading an update, it will forcibly terminate all of the active Data Stations first.
- When the Textbook Tracker Controller needs to quit, it will time-out after eight seconds with an additional two seconds per active Data Station.

¡ WARNING !
COMPanion recommends that all maintenance to your Textbook Tracker Controller or managed Data Stations be done after business hours.

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